View in browser

FinancialPlanning

Wealthtech Weekly

August 28, 2025

By Rob Burgess
Reporter

In the latest edition of the mighty "Show Me Your Stack," I spoke with Andrew J. Evans of Rossby Financial, an enterprise RIA in Melbourne, Florida. His favorite Disney films include "Brave," "Aladdin" and "The Little Mermaid," but his appreciation goes deeper.

He told me he follows Walt Disney's maxim of "plussing," or improving, when it comes to his ever-changing tech stack.

What is your tech stack philosophy? Let me know — robert.burgess@arizent.com.

I hope you'll check out the articles, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

FinancialPlanning

Labor Day Sale
Save 60%
SUBSCRIBE

TOP STORIES

SHOW ME YOUR STACK

An RIA tech setup inspired by Walt Disney: Show Me Your Stack

Rossby Financial CEO Andrew J. Evans applies the entertainment legend's "plussing the park" philosophy to keep his firm's tech stack flexible.

- **Family values: How teaming with relatives gives advisors an edge**
  Siblings, spouses, children and parents in the wealth management industry have found fulfillment and success going against this common wisdom, though it can present challenges.
- **AI-powered simulation sandboxes could offer advisors a 'crystal ball'**
  At Financial Planning's recent AI Virtual Summit, Sameer Munshi of EY Consulting discussed how advisors could use the burgeoning technology to safely test client messaging and more.
- **Taking the mound for Orion, Reed Colley looks to the future**

The current president of Omaha, Nebraska-based Orion Advisor Technology and former starting pitcher for the Vanderbilt University baseball team spoke recently with Financial Planning about his new role, AI, the challenges of bringing various solutions together in one place and more.

- **Most advisors admit they don't fully understand — or manage — crypto**
  Volatility, concerns over security and custody, and a lack of clear regulatory framework are the key barriers to adoption, according to Financial Planning's August Financial Advisor Confidence Outlook survey.

Read the latest in Wealthtech

Michael Kitces joins ADVISE AI 2025 PLUS registration is OPEN!

Register today for the industry's can't-miss event.

You're receiving this email because you signed up for Editorial emails from Financial Planning.

To update the emails you want to receive, or to unsubscribe from our mailing list, please visit our Email Preference Center.

arizent

Arizent
360 Madison Avenue, 8th Floor
New York, NY 10017

About | Subscriptions | Contact | Privacy Policy

Have questions or concerns? Contact Support

Follow us in real time: